



Indiana Department of Environmental Management
Protecting Hoosiers and Our Environment Since 1986

Office of Program Support



Indiana Recycling Infrastructure & Economic Study

Overview

September 2021



Background

- Commissioned by the Recycling Market Development Board (RMDB)
- Conducted by GT Environmental
- Evaluated Indiana's recycling infrastructure and the significant economic impact of recycling in the state
- Included are recommendations to improve statewide recycling and further develop a circular economy



Current Waste and Recycling Infrastructure

Data obtained through:

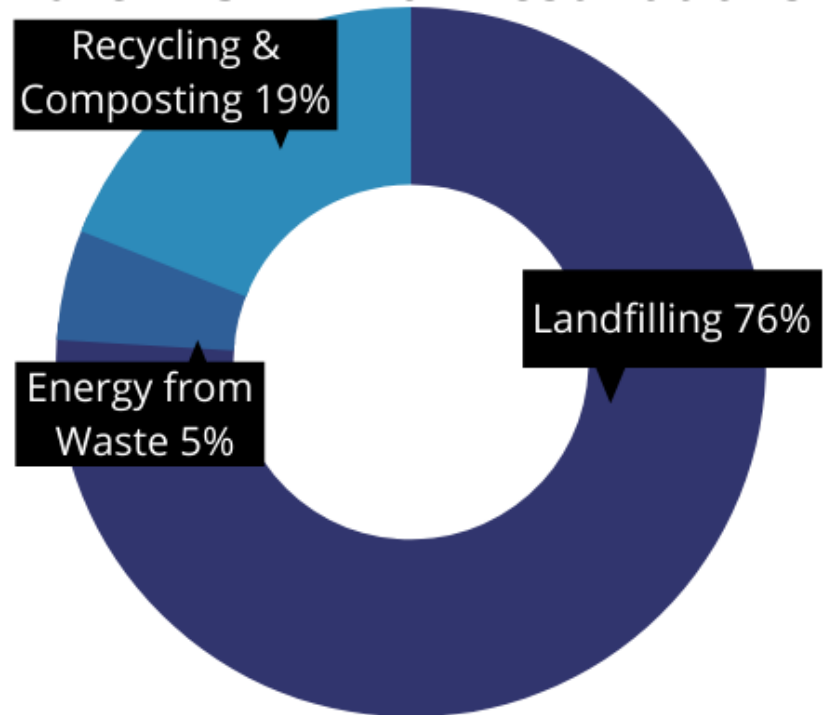
- IDEM recycling activity report
- Surveys to solid waste districts, communities, and processors
 - Conducted by IUPUI students



Current Waste and Recycling Infrastructure

- Approximately 8.8 million tons of MSW collected in 2019

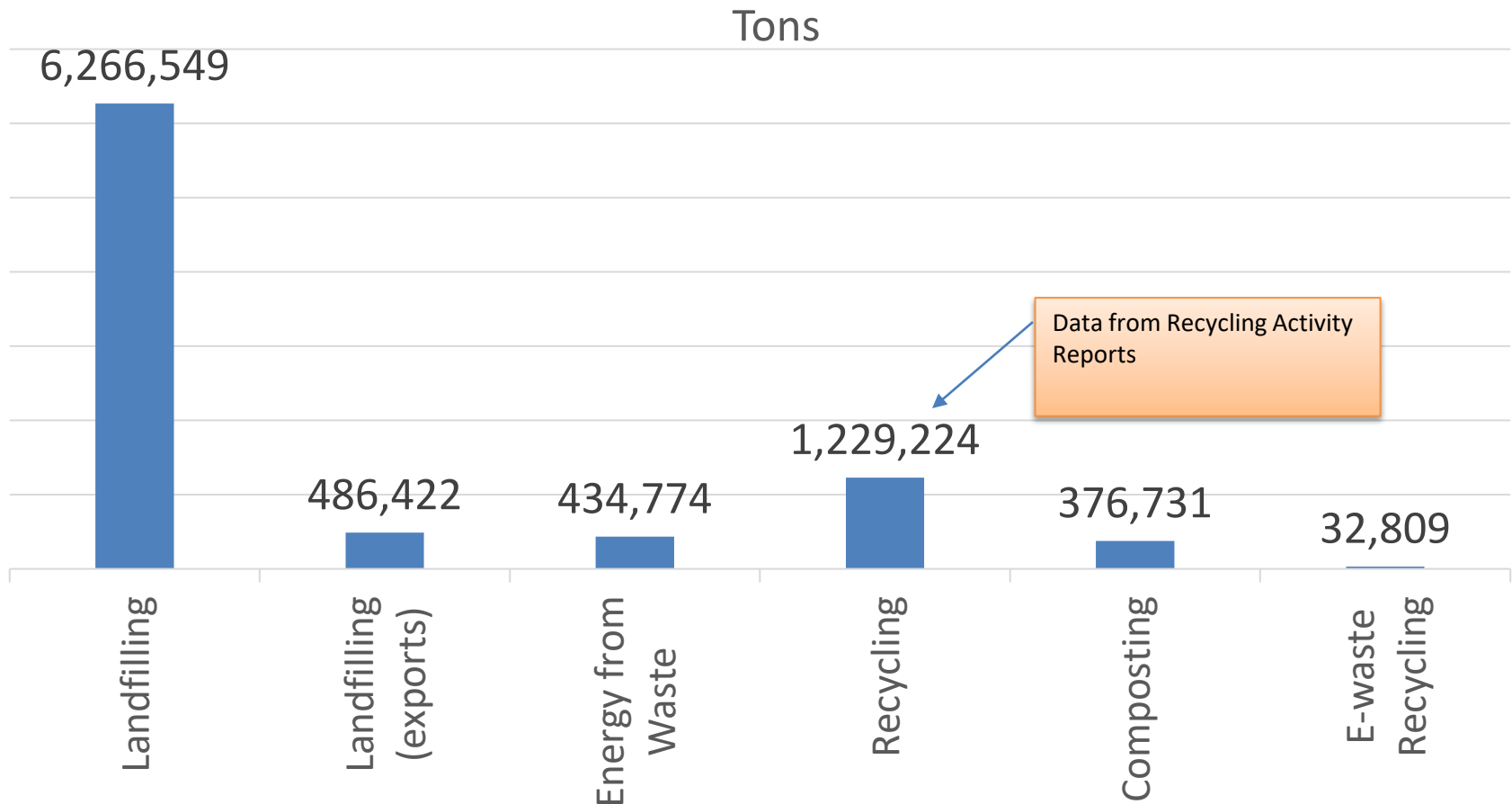
2019 MSW Final Destinations





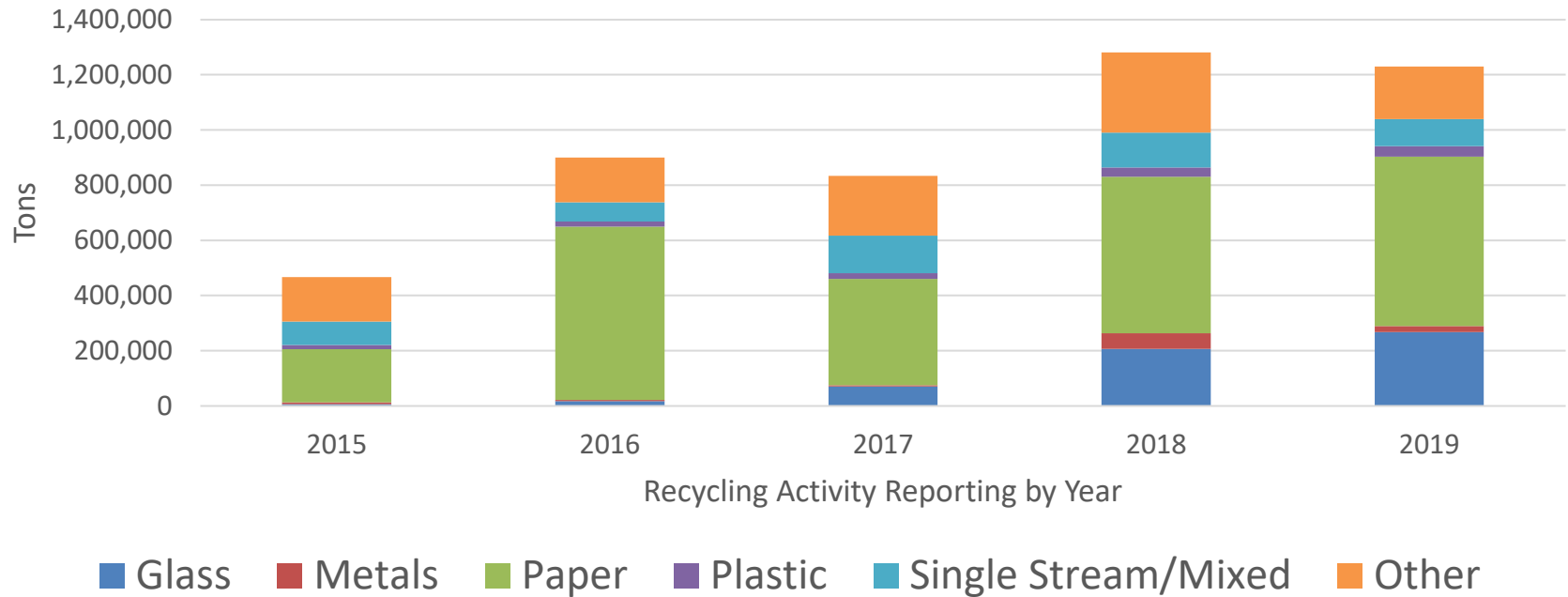
Current Waste and Recycling Infrastructure

2019 municipal solid waste (MSW) generation





Annual Shipments of Recyclables





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Current Waste and Recycling Infrastructure

34 Landfills



78 Transfer Stations



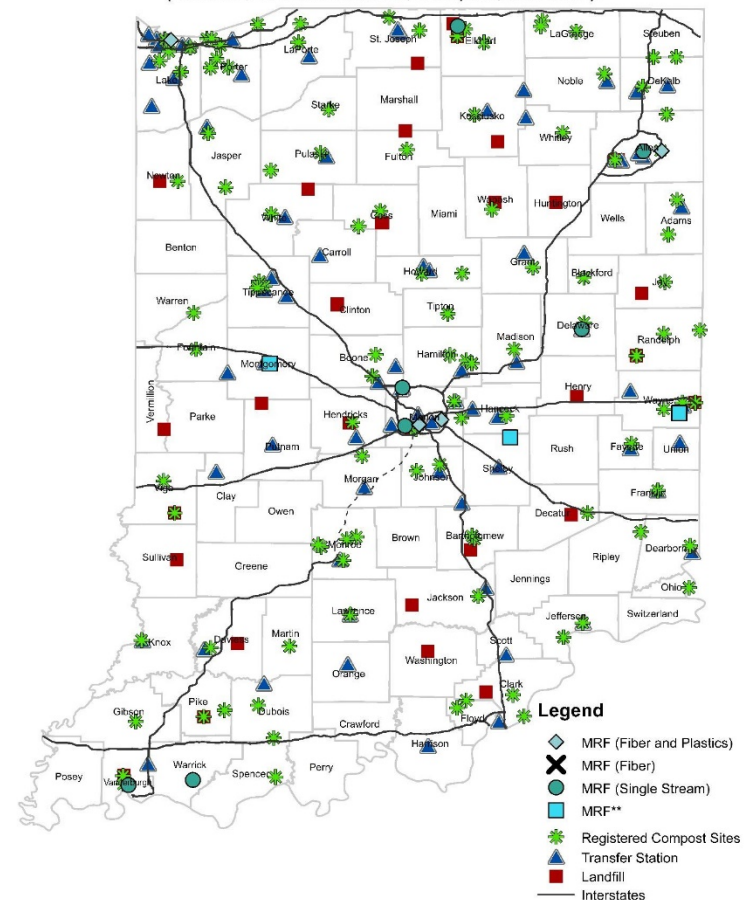
116 Compost Sites



14 MRFs



2019 Materials Management Facilities
(Landfills, Transfer Stations, Compost, and MRF)

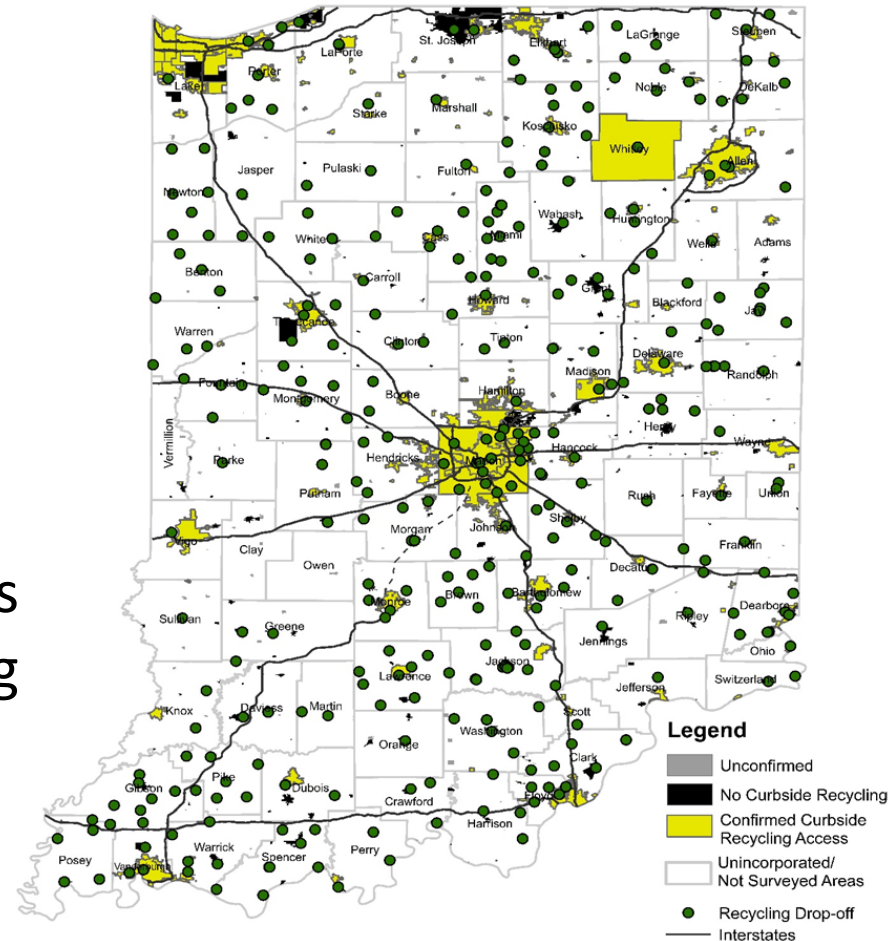




Curbside and Drop-off Recycling Access Surveys

- At least 197 communities have residential curbside recycling, based on completed surveys
- 313 recycling drop-offs across the state
- 97% of the counties have access to curbside or drop-off recycling

Curbside and Drop-Off Recycling Access in Indiana





Indiana's Recycling Economic Impact

- The economic portion of the study focuses on the impact of two areas of the circular economy in Indiana:
 - The **supply side** provided by the collection and processing of recyclables performed by the recycling industry
 - The **demand side** represented by manufacturers using recycled commodities.





Indiana's Recycling Economic Impact

- Economic impact was determined using IMPLAN model inputs and analyzed by IU Public Policy Institute
 - Data used included IDEM's recycling activity report, commodity pricing averages, limited survey data, and the North American Industry Classification System (NAICS) codes



INDUSTRY



JOBS

8,533



**ECONOMIC
CONTRIBUTION**

\$1.7 BILLION



**TAX
CONTRIBUTION**

\$132 MILLION

MANUFACTURERS



JOBS

357,043



**ECONOMIC
CONTRIBUTION**

\$117 BILLION



**TAX
CONTRIBUTION**

\$2.2 BILLION

The Study assessed direct, indirect, and induced economic contributions of the recycling industry and manufacturers

- Indirect jobs are the inter-industry impacts attributed to company spending on goods and services
- Induced impacts include the impacts of household spending by the employees generated by the direct and indirect impacts



Indiana's Recycling Economic Impact

Recycling industry or supply-side employment

	Direct	Indirect & Induced	Total
Employment	4,255	4,278	8,533
Employee compensation	\$282,060,456	\$231,834,608	\$513,895,064
Value added	\$586,851,454	\$388,289,298	\$975,140,752
Output	\$1,034,863,496	\$702,829,848	\$1,737,693,344



Indiana's Recycling Economic Impact

End users or demand-side employment

	Glass	Metals	Fiber	Plastics
Direct employment	4,433	96,170	10,114	32,713
Indirect employment	4685	170,056	10,678	28,194
Total employment	9,118	266,226	20,792	60,907
Compensation	\$570 million	\$17 billion	\$1.3 billion	\$3.5 billion
Total output	\$2.6 billion	\$95 billion	\$5 billion	\$14.5 billion

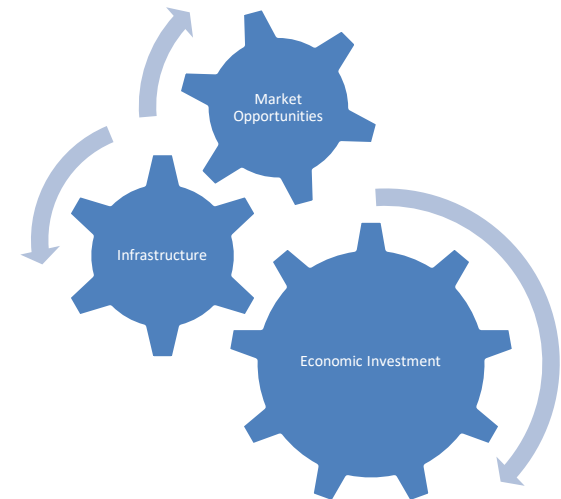


What's Next?

- Recommendations

- Data collection
- Materials management planning
- Indianapolis and Marion County
- State and local funding
- Recycling collection programs
- Recycling processing
- Organics and food waste
- Grant programs
- Economic development
- End-user recycling markets
- Public-private partnerships

- Long-Term Roadmap





Questions?

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